

Croydon Pensions Admin Team Performance Report



Delivering for Croydon



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Reference Key Table

Direction	of travel reference table
1	100% achieved against target performance improved
	100% achieved on target and performance static
	>90% achieved against target and performance improved
-	>90% achieved against target and performance static
	>90% achieved against target and performance declined
1	<90% achieved against target and performance improved
	<90% achieved against target and performance static
	<90% achieved against target and performance declined

Legal Deadlines

	Legal	Total	%	Total	%	Total	%		
Process	Requirement	Number Completed	Achieved in legal deadline	Number Completed	Achieved in legal deadline	Number Completed	Achieved in legal deadline	Direction of Travel	Comments
		Novemb		Decemb		January			
Send a notification of joining the LGPS to a scheme member	Two months from the date of joining the scheme or earlier if within one month of receiving jobholder information where the individual is being automatically enrolled/re- enrolled	152	61.18%	127	90.55%	156	89.10%	1	
Inform a scheme member of their calculated benefits (refund or deferred) – backlog cases	As soon as practicable and no more than two months from the date of notification (from employer or scheme member)	26	15.38%	11	27.27%	14	7.14%	↓	Historical backlog is impacting performance. Contract has now been awarded to Hymans Robertson to provide administration services to clear this backlog, which is currently in the mobilisation phase.
Inform a scheme member of their calculated benefits (refund or deferred) – new cases	As soon as practicable and no more than two months from the date of notification (from employer or scheme member)	33	81.82%	30	83.33%	16	68.75%	↓ ↓	

Legal Deadlines

Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		Novemb	er 2020	Decemb	December 2020		January 2021		
To process and pay a refund	Two months from the date of request	12	100%	14	100%	10	100%	-	
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	7	85.71%	5	100%	3	100%	1	
Notify the amount of retirement benefits	One month from the date of retirement if on or after normal pension age or two months from the date of retirement if after normal pension age	31	100%	38	100%	45	100%		
Provide a retirement quotation on request	As soon as practicable but no more than two months from the date of request unless there has already been a request in the last 12 months	47	100%	62	100%	196	100%		There has been an extraordinary increase in demand due to Croydon Council severance scheme.

Legal Deadlines

Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		Novemb	er 2020	Decemb	er 2020	Januar	y 2021		
Calculate and notify (dependent(s) of amount of death benefits	As soon as possible but in any event no more than two months from date of becoming aware of death or from date of request from a third party (e.g. personal representative)	33	100%	28	100%	41	97.56%		
Provide all active and deferred members with annual benefit statements each year	By 31 st August	16690							An ABS has been issued for all members who were due to receive one

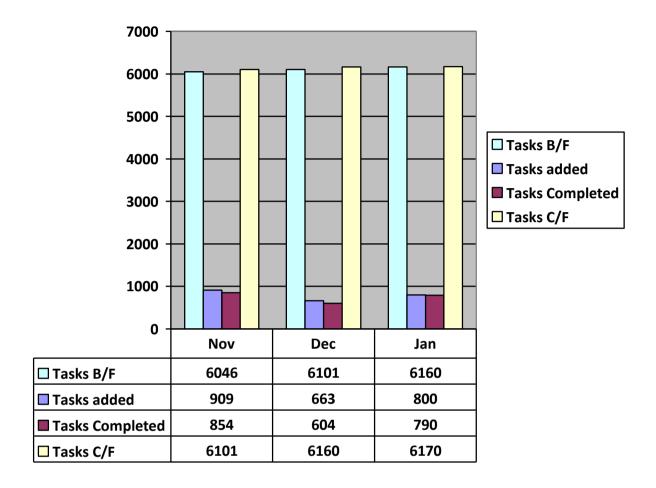
Team Performance Targets

Process	Team Target	Total Number	% Achieved	Average days to	Total Number	% Achieved	Average days to	Total Number	% Achieved	Average days to		
	Target	Completed	against target	process	Completed	against target	process	Completed	against target	process	Direction of Travel	Comments
		No	vember 2020		De	cember 2020		J	anuary 2021			
Send a	30 days	152	49.34%	46	127	87.40%	15	156	89.10%	16	1	
notification of joining the	from date of										_	
LGPS to a	notification											
scheme	of joining											
member	member											
Inform a	40 working	26	15.38%	523	11	27.27%	737	14	7.14%	663		Historical backlog is
scheme	days from										-	impacting performance.
member of	date of											Contract has now been
their	notification											awarded to Hymans Robertson to provide
calculated	(from											administration services to
benefits	employer											clear this backlog, which is
(refund or	or scheme											currently in the
deferred) –	member)											mobilisation phase.
backlog cases OInform a	40 working	33	72.73%	44	30	66.67%	32	16	68.75%	43		
G scheme	days from		12.13%	44	30	00.07 %	52	10	00.75%	43		
member of	date of											
Nheir	notification											
calculated	(from											
benefits	employer											
(refund or	or scheme											
deferred) –	member)											
new cases												
To process	40 working	12	100%	5	14	100%	3	10	100%	2		
and pay a	days from										· · ·	
refund	the date of											
Obtain	request 40 working	7	71.43%	23	5	100%	9	3	66.67%	3		Lockdown resulted in
transfer	days from	1	71.43%	23	5	100%	9	5	00.07 %	3	-	delays in requesting
details for	the date of											quotes as there was less
transfer in,	request											office presence to
calculate and												undetake printing required.
provide												
, quotation to												
member												

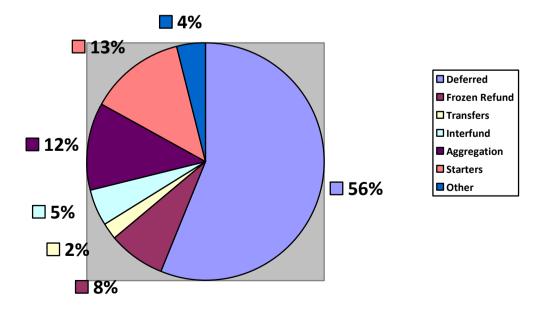
Team Performance Targets

Process	Team Target	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Direction of Travel	Comments
		No	target ovember 2020		De	target cember 2020		J	target anuary 2021			
Notify the amount of retirement benefits	20 working days from date of retirement	31	100%	3	38	100%	3	45	100%	2	-	
Provide a retirement quotation on request	15 working days from date of request	47	93.62%	7	62	96.61%	4	196	100%	5	1	There has been an extraordinary increase in demand due to Croydon Council severance scheme
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	33	93.94%	8	28	100%	6	41	97.56%	6	Ļ	Small number of cases not processed in deadline as further information was needed

Case levels



Outstanding Cases by Type



Member self-service

Scheme members registered	4637 (27%)
Number scheme members who accessed annual	447
benefit statement Q3 Oct 2020 – Dec 2020.	